

North Carolina COVID-19 Vaccine Management System (CVMS) Provider Portal

**Create user accounts for
your organization's CVMS
users**

User Guide

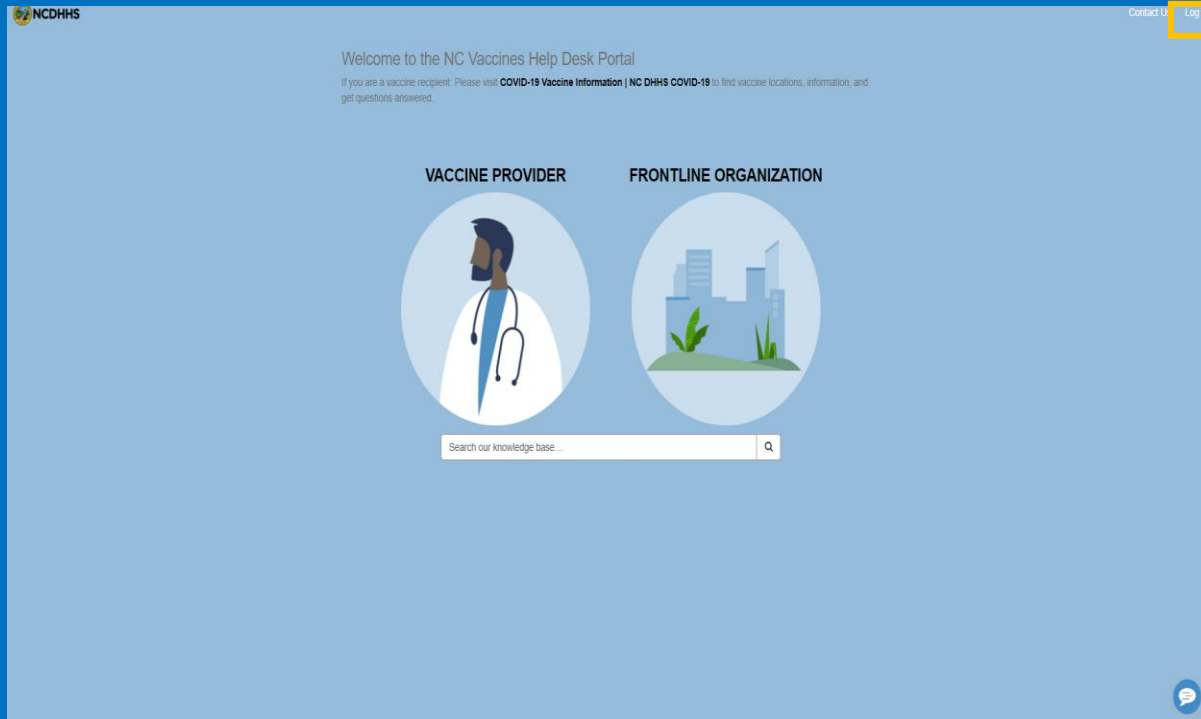
Version 12

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NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the NC Vaccines Help Desk * at

https://ncgov.servicenowservices.com/csm_vaccine

You can also call the NC Vaccines Help Desk at **(877) 873-6247** and select option 1.

The NC Vaccines Help Desk is available during the following hours:

Monday to Friday: 7 am – 7 pm ET

Saturday: 8 am – 4 pm ET

Sunday: Closed

* On the home page of the NC Vaccines Help Desk Portal, select **Login** at the top right-hand corner, then select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the NC Vaccines Help Desk Portal will have to follow the steps below:

1. Register for an account by clicking '**Login**' then '**Register**' on the left side of the screen
2. Populate your first name, last name, business e-mail, and registration code

Note: If you do not know your organization's registration code (ORG-ID), please contact the help desk

3. You will receive an e-mail with your username and temporary password to log into the portal

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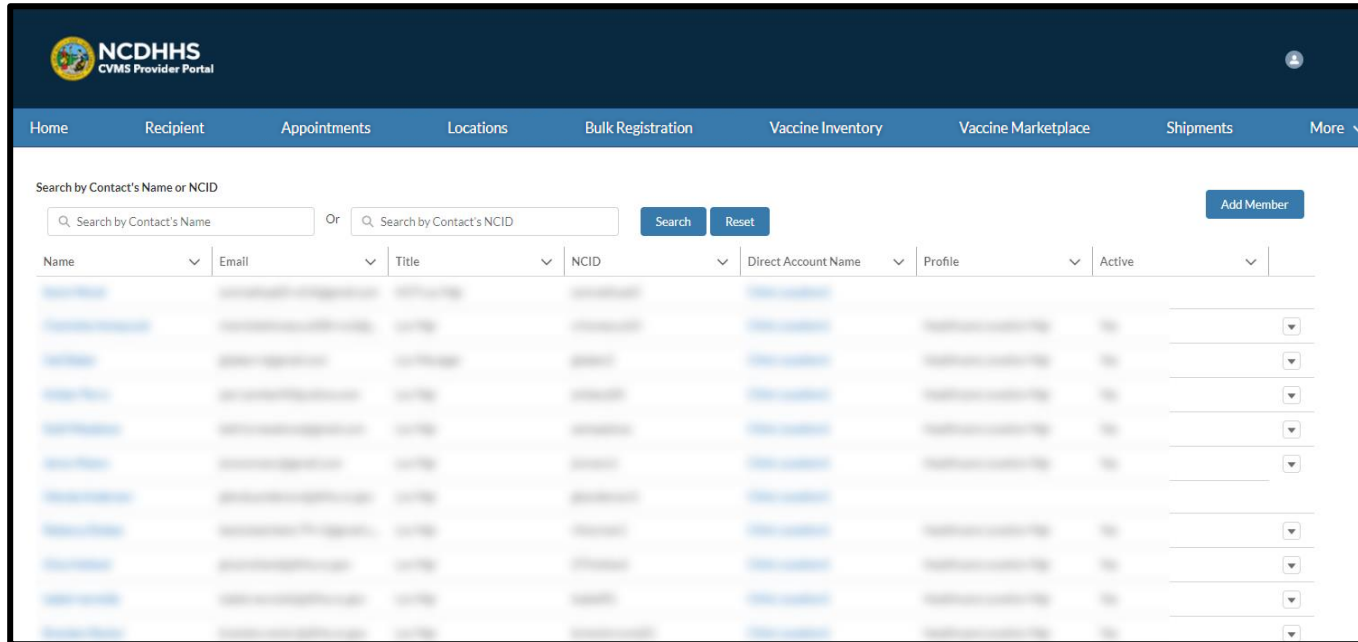
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Overview

Overview

In this user guide, we will review User Account Management. **User Accounts Management** will allow you to create and onboard new users to the CVMS Provider Portal. You will be able to:

- Search and create CVMS Provider Portal user accounts
- Edit user account details and profiles
- Add / remove locations to a user account
- Deactivate user accounts



The screenshot shows the NCDHHS CVMS Provider Portal interface. At the top is a dark blue header with the NCDHHS logo and the text "CVMS Provider Portal". Below the header is a navigation bar with links: Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, and More. The main content area has a search bar with two input fields: "Search by Contact's Name" and "Search by Contact's NCID", separated by an "Or" label. There are "Search" and "Reset" buttons. To the right of the search bar is an "Add Member" button. Below the search bar is a table with columns: Name, Email, Title, NCID, Direct Account Name, Profile, and Active. The table contains several rows of data, each with a dropdown arrow in the Active column.

The processes included in this user guide are for users with the **Healthcare Location Manager** profile only.

Additionally, you will need to:

- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers.
- Log in the CVMS Provider Portal with your NCID username and password at <https://covid-vaccine-provider-portal.ncdhhs.gov>

Now, let's get started!

Four User Profiles are Available

Healthcare Location Manager

The Healthcare Location Manager is an available user profile for the CVMS Provider Portal. This profile gives Healthcare Location Managers permission to access the following tabs: Home, Recipient, Appointments, Bulk Registration, Vaccine inventory, Shipments, Reports, Account Management, Organization Management, and Help & Information. Healthcare Location Managers are in charge of managing user accesses for their location(s), manage the inventory, access reports, upload recipients, and everything a Healthcare Provider can do. There is always at least one user with a Healthcare Location Manager profile per vaccine provider account.

Healthcare Provider

The Healthcare Provider is another available user profile for the CVMS Provider Portal. This profile gives Healthcare Providers permission to access the following tabs: Home, Recipient, Appointments, and Help & Information. This user can register a recipient, book an appointment, check the recipient in, log an administration of a Vaccine.

Healthcare Provider Read-Only

The Healthcare Provider Read-Only profile gives users permission to access the following tabs: Recipient, Account Management, and Help & Information. This role allows a provider to check a recipient's information, vaccination and to create other users with a Read-Only profile.

Statewide Location Manager

This profile was created for surge staff, National Guard resources, or other statewide support to reinforce any vaccine provider. This profile allows them to access all active vaccine provider locations in the State and is therefore limited to a select population.

List of features available per profile

	Healthcare Location Manager	Healthcare Provider	Healthcare Provider Read-Only	Statewide Location Manager
Search recipients	✓	✓	✓	✓
Register new recipient records	✓	✓		✓
Edit Recipient Records	✓	✓		✓
Check-in recipient	✓	✓		✓
Cancel appointment	✓	✓		✓
Log a vaccine administration	✓	✓		✓
Modify or cancel a vaccine administration	✓	✓		✓
Book an appointment using the scheduling feature (only if feature was activated)	✓	✓		✓
Manage Inventory (add, declare wastage, edit, transfer)	✓			
List your extra or solicit wanted vaccines in the marketplace	✓			
Manage Location details published on vaccination site locator at vaccines.gov	✓			
Activate and setup the vaccine appointment feature	✓			
Manage User accounts (add, remove, access to multiple locations)	✓		✓	✓
Access Reports	✓			
Give Frontline organizations access to the CVMS Organization Portal	✓			
Access Help & Information, Chatbot	✓	✓	✓	✓
Switch to other locations (if access granted to more than one location)	✓	✓	✓	✓
Access to all the Provider Accounts				✓

Account Management Overview

The Account Management process enables Healthcare Location Managers to onboard staff or individuals that require access to the CVMS Provider Portal. Before starting this process, make sure to collect NCID usernames and valid email addresses for each user who requires a CVMS Provider Portal account.



1

Navigate to the Account Management tab in the CVMS Provider Portal.

Healthcare Location Managers can onboard authorized staff or individuals and provide access to the CVMS Provider Portal through the self-service Account Management tab.



2

Click Add New Member. Populate and save the HCP Provider Portal Contact record.

You will be required to enter the first name, last name, profile, NCID username and associated email address for each user.

Make sure to check that the NCID username was created using the associated email address.



3

After clicking Save, an automatic email will be sent to the users inviting them to sign into their CVMS Provider Portal account and start performing their applicable activities.

As a Healthcare Location Manager, you will be able to edit the assigned profile and NCID username if you need to correct any information.

Create a New User Account

Step 1 of 7: Navigate to Account Management Tab

Before beginning the Account Management process, collect the first name, last name, email address, and NCID usernames for the individuals you want to add as users in the CVMS Provider Portal. You will need an NCID username for each person to add them to the CVMS Provider Portal.

Note: The first Healthcare Location Manager for an account is created in the Provider Enrollment process. This first Healthcare Location Manager will then be able to add and manage additional users in the CVMS Provider Portal.

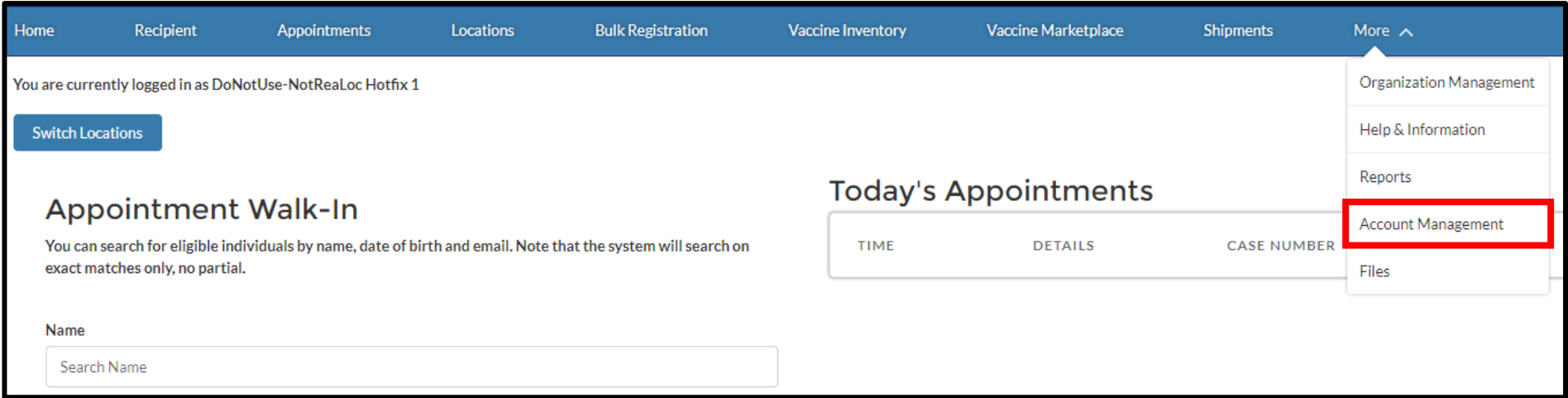
- 1. From the homepage, click **MORE**
- 2. Click the **ACCOUNT MANAGEMENT** tab from the drop down

Audience

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Location Manager

Tips

You will only be able to onboard individuals to the Locations you have access to within your Organization.



Step 2 of 7: Search for an Existing Account

Before you create a new CVMS Provider Portal account for an individual, search for them first to make sure that they do not already have one. If a user record already exists, skip to the **ADD AN EXISTING USER TO YOUR LOCATION** section. If a record does not exist, continue with this step.

- 1. Search for the user by **NAME OR NCID USERNAME**

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Search by Contact's Name or NCID

Search by Contact's Name

Or

Search by Contact's NCID

Search

Reset

Add Member

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Tips

Do not search both name and NCID simultaneously. The search must be done separately.

Step 3 of 7: Click Add Member

Once you confirm that the individual does not have an existing CVMS Provider Portal account, you can create a CVMS Provider Portal account.

- 1. Click **ADD MEMBER**

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Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More ▾

Search by Contact's Name or NCID

Search by Contact's Name

Or

Search by Contact's NCID

Search

Reset

Add Member

Step 4 of 7: Enter the HCP Portal Contact Details

After clicking **ADD MEMBER**, you will be directed to the Create HCP Portal Contact page. You will be asked to provide the individual's details.

1. Enter **FIRST** and **LAST** name used to register the NCID username
2. Enter **EMAIL ADDRESS** used to register the NCID username
3. Click the **ACCOUNT (LOCATION) NAME** search. Select **ACCOUNT** from the drop down
4. Select a **PROFILE** from the drop-down menu
5. Enter the **NCID USERNAME**
6. Click **SAVE RECORD**

Create HCP Portal Contact

* First Name

* Last Name

* Email

* Account Name

Search Accounts...

Title

* Profile

--None--

* NCID

Phone

Cancel Save Record

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Tips

The PROFILE will allow you to add a user as a Healthcare Provider, Healthcare Location Manager, Statewide Location Manager, or a Healthcare Provider Read-Only (used for those that need to view the system, but not input data).

Step 5 of 7: Search for Individual on the User List

Once you save the new HCP Portal Contact record, you will be directed back to the Account Management tab. You will be able to view the individual’s name and NCID username on the list.

- 1. Click the **NAME**
- 2. After clicking the Name, you will be directed to the **CONTACT RECORD**

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Tips

The **Profile** and **Active** columns will not update on the list until the newly added user logs into their CVMS Provider Portal account for the first time.

Some of the functions in this user guide are only applicable to active accounts.

Home Recipient Appointments Locations Bulk Registration Vaccine Inventory Vaccine Marketplace Shipments More							
Search by Contact's Name or NCID							
<div>Search by Contact's Name</div> <div>Or</div> <div>Search by Contact's NCID</div> <div>Search Reset</div>							
Name	Email	Title	NCID	Direct Account Name	Profile	Active	
Steve DiGangi	steven.j.digangi_acn@dhhs.nc...		sdigangi_hcp_lm	TestLoc_UAT1	Healthcare Location Mgr	Yes	
Steve DiGangi	steven.j.digangi@accenture.c...		sdigangi_training	TestLoc_UAT1	Healthcare Provider - Read O...	Yes	
Darrell Lee	darrell.e.lee@accenture.com		dlee20	TestLoc_UAT1	Healthcare Location Mgr	Yes	
Jim Readonly	jimreadonly@mailinator.com		jimreadonly	TestLoc_UAT1			
Darrell Lee	darrell.lee-acn@dhhs.nc.gov		darrell.e.lee	TestLoc_UAT1	Healthcare Provider	Yes	
Larry Lawrence	larrylarry@mailinator.com		larrylarry	TestLoc_UAT1			
John Roddy	johnroddy@mailinator.com	Dr.	jroddy	Training Team Vaccine Provid...			

Step 6 of 7: Review and Edit the User Contact Record

Each CVMS Provider Portal account has an HCP Portal Contact record. You will be able to review the information you provided and edit the information.

If you need to edit the email address on the Contact record, see the Appendix for further instructions.

- 1. Click the **PENCIL ICON** next to the field you wish to edit
- 2. Make the changes
- 3. Click **SAVE**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine Marketplace

ContactJohn Roddy

TitleDr.

ProfileHealthcare Location Mgr

Account NameTraining Team Vaccine Provider - Site 1

Phone (2) ▼

Emailjohnroddy@mailinator.com

DETAILS

RELATED

NameJohn Roddy

Account NameTraining Team Vaccine Provider - Site 1

Vaccine Surge Group

Phone

Mobile

Emailjohnroddy@mailinator.com

NCIDjroddy

ProfileHealthcare Location Mgr

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Tips

By editing the Profile field, you will be updating the permissions for the individual’s CVMS Provider Portal account.

If the e-mail address is edited, the system will automatically send an invitation e-mail to the new e-mail address provided.

Step 7 of 7: Automatic Email Notification Sent to the User

After the HCP Portal Contact record is created, an automatic email is sent to the email address provided inviting the individual to sign into their CVMS Provider Portal account.

Hi Lisa,

Welcome to the COVID-19 Vaccine Management System (CVMS).

To get started, go to <https://covid-vaccine-provider-portal.ncdhhs.gov> you will be redirected to the NCID sign on page, enter your NCID and password and select NCID Login. You will then be automatically logged into the CVMS Provider Portal.

Need support? Submit your question to the help desk here: https://ncgov.servicenowservices.com/csm_vaccine

Thank you,
NC Department of Health and Human Services
Division of Public Health

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Add an Existing User to Your Location

Add an Existing User to Your Location

If an active user already exists within CVMS, you do not have to create a new account for them to add them to your location.

- 1. Search for the user
- 2. Hover over the arrow on the right-hand side in the **ACTIVE** column
- 3. Click on **ADD TO MY LOCATION**

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Tips

If a user already has an active CVMS Provider Portal account associated with another location, adding them to your location will not overwrite their previous access. They will simply be added to your location as well.

Search by Contact's Name or NCID

avion bell

×

Or

Search by Contact's NCID

☒ Check this box to search for all contacts (including contacts not at my location)

Search

Reset

Name

Email

Title

NCID

Direct Account Name

Profile

Active

Avion Bell

avion.bell@ey.com

HCLM

abell1

TESTPEOrgHaz

Healthcare Location Mgr

Yes

Avion Bell

avion.bell@ey.com

HCP

abell2

TESTPEOrgHaz

Healthcare Provider

Manage Relationships

Add to My Location

← Previous

Page 1 out of 1

Next →

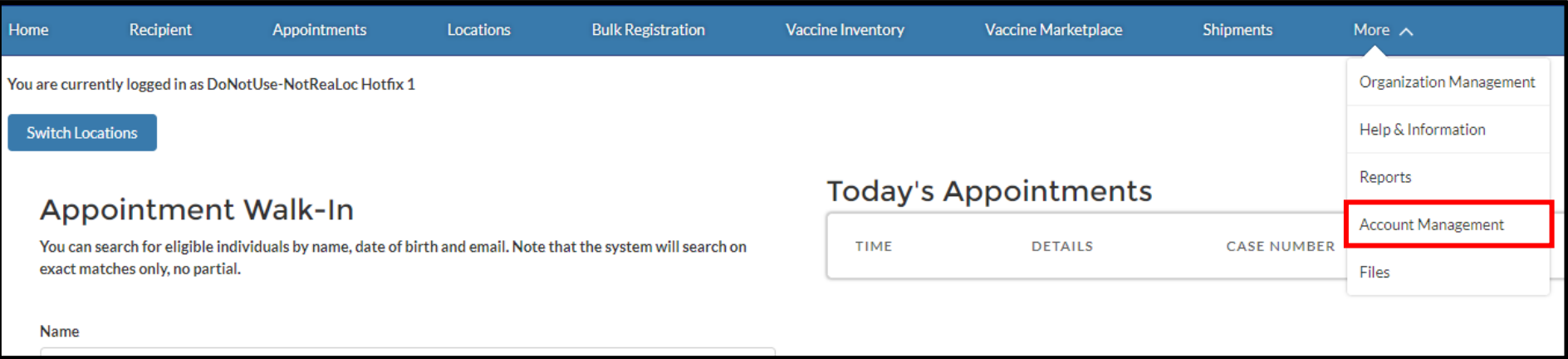
Bulk Upload New User Accounts

Step 1 of 7: Navigate to Account Management Tab

Before beginning the Account Management bulk upload process, collect the first name, last name, email address, NCID username, and profile type for the individuals you are onboarding. You will need a valid NCID username for each user to onboard them to your location in the CVMS Provider Portal.

Note: All users added through this process will be associated with the location to which you are currently logged-in. If you need to add user relationships with multiple locations, you will have to edit the individual records after they have been uploaded.

- 1. From the homepage, click **MORE**
- 2. Click the **ACCOUNT MANAGEMENT** tab from the drop down



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Tips

If a user already has a CVMS Provider Portal account associated with another location, adding them via the bulk upload process will not overwrite their previous access. They will simply be added to your location as well.

Step 2 of 7: Access the Bulk HCP Upload Template

1. Carefully read the instructions
2. Click on the **BULK HCP UPLOAD TEMPATE** hyperlink

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[Home](#) [Recipient](#) [Appointments](#) [Locations](#) [Bulk Registration](#) [Vaccine Inventory](#) [Vaccine Marketplace](#) [Shipments](#) [More](#) ▼

Instructions for Healthcare Provider Bulk Upload

1. To provide access to multiple users at one time, please use the [Bulk HCP Upload template](#). The template requires first name, last name, NCID username, email address and profile type for each person on your list. **Note: Profile Names need to be spelled exactly as specified or the upload will fail.**

a. Profile types:

i. A [Healthcare Provider](#) is responsible for Recipient check-in, point-of-care Recipient registration, Recipient eligibility verification, and vaccine administration detail capture.

ii. A [Healthcare Location Mgr](#) is responsible for viewing, receiving, and adding inventory, viewing orders and shipment details, viewing and updating vaccine inventory levels, managing location inventory, performing Recipient bulk upload, managing Scheduling of appointments (optional), adding / managing / deactivating HCP Users, adding frontline organizations, reviewing reports, and additionally – all of the activities that a Healthcare Provider can do.

b. If you have users that do not have an NCID, have them follow [these instructions](#) to obtain one.

2. Enter the required fields for every healthcare provider who needs access to the portal. Only 100 users can be uploaded at a time. If your list contains more than 100 users, please create a second document using the Bulk HCP Upload Template.

3. Once you have entered all the information in the Bulk HCP Upload Template, save the file as a .csv file.

4. Submit one file at a time by dragging and dropping the .csv file into the box below. A popup will appear to tell you if your upload was successful and if any records failed to upload.

a. If upload fails: You will get an immediate notification if there are any errors uploading your file.

b. If any records fail: Your file may have uploaded partially. In this case, you will receive a list by email with a column labeled "Error" which identifies the issue with each failed record. Once you have resolved all the indicated errors, delete the "Error" column and repeat Step 3 to upload the remaining records.

5. Your successfully uploaded records will display on this page below *Search by Contact's Name or NCID*.

Drag and Drop CSV file here

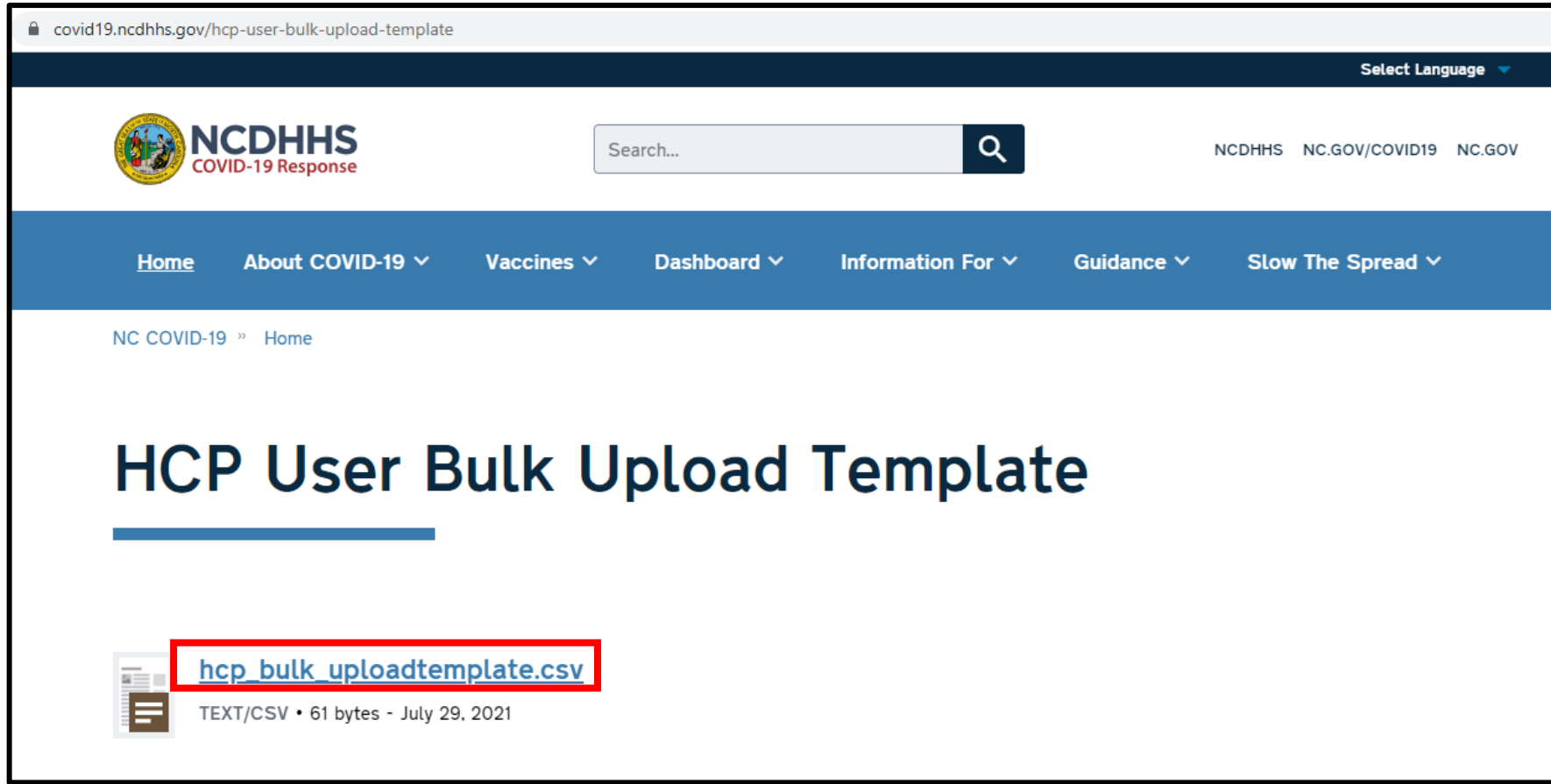
Search by Contact's Name or NCID

Add Member

Step 3 of 7: Download the HCP User Bulk Upload Template

The hyperlink will link to an external site which contains the HCP User Bulk Upload Template.

1. Click on the **HCP_BULK_UPLOADTEMPLATE.CSV** hyperlink to begin the automatic download



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Step 4 of 7: Fill and Save the HCP User Bulk Upload Template

1. Open the .CSV file that was downloaded
2. Enter each field for the users you are onboarding

Note: You must enter the **PROFILE** field exactly as listed (non-case sensitive): **Healthcare Provider** or **Healthcare Location Mgr**

3. Save the file to your computer

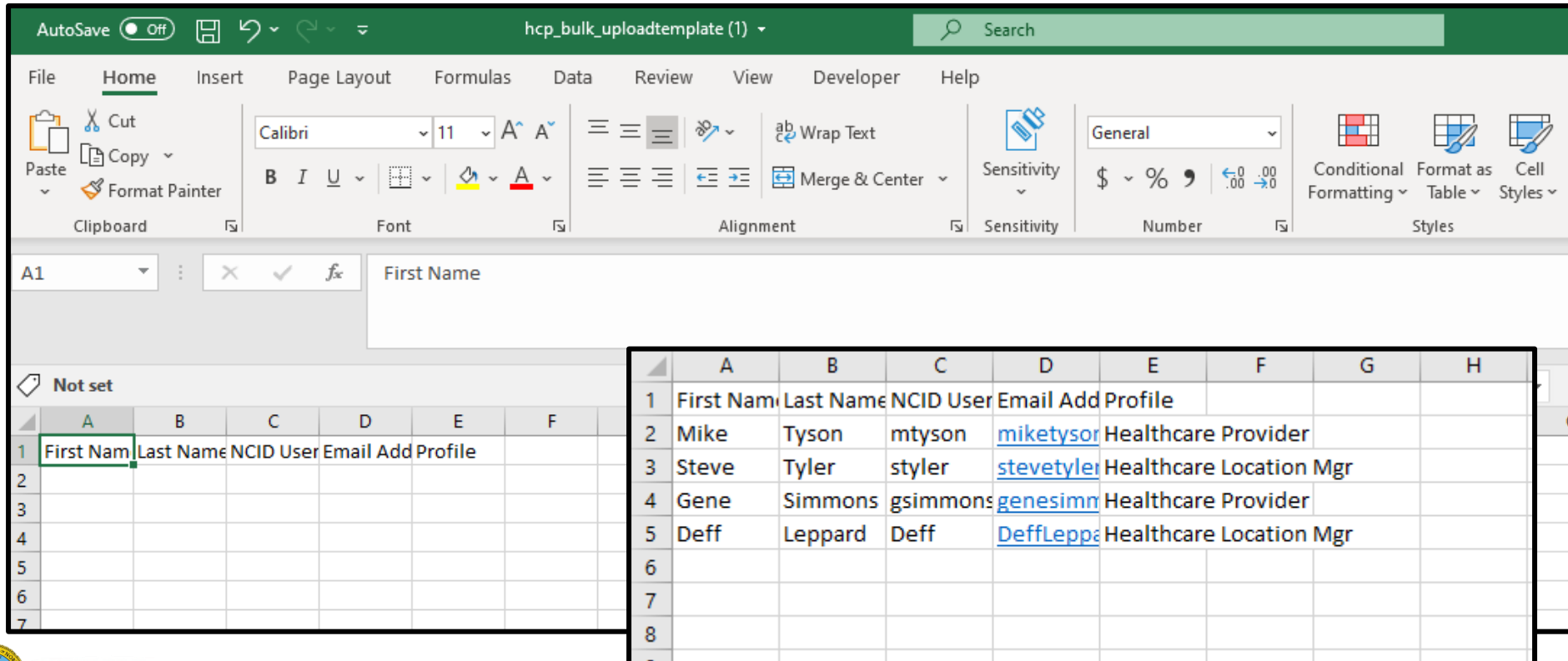
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Tips

If you can't find the downloaded file, check the **DOWNLOADS** folder on your computer.

You cannot create users with the Healthcare Provider Read-Only profile via the Bulk Upload process. They must be created individually.



	A	B	C	D	E	F	G	H
1	First Name	Last Name	NCID User	Email Add	Profile			
2	Mike	Tyson	mtyson	miketyson	Healthcare Provider			
3	Steve	Tyler	styler	stevetyler	Healthcare Location Mgr			
4	Gene	Simmons	gsimmons	genesimm	Healthcare Provider			
5	Deff	Leppard	Deff	DeffLeppa	Healthcare Location Mgr			
6								
7								
8								

Step 5 of 7: Drop the .CSV File on the Account Management Page

Once the .csv file is saved, you can commence with the upload.

1. Locate the file, drag, and drop the saved file onto the gray drop box on the Account Management page

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HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Instructions for Healthcare Provider Bulk Upload

1. To provide access to multiple users at one time, please use the Bulk HCP Upload template. The template requires first name, last name, NCID username, email address and profile type for each person on your list. **Note: Profile Names need to be spelled exactly as specified or the upload will fail.**

a. Profile types:

i. A Healthcare Provider is responsible for Recipient check-in, point-of-care Recipient registration, Recipient eligibility verification, and vaccine administration detail capture.

ii. A Healthcare Location Mgr is responsible for viewing, receiving, and adding inventory, viewing orders and shipment details, viewing and updating vaccine inventory levels, managing location inventory, performing Recipient bulk upload, managing Scheduling of appointments (optional), adding / managing / deactivating HCP Users, adding frontline organizations, reviewing reports, and additionally - all of the activities that a Healthcare Provider can do.

b. If you have users that do not have an NCID, have them follow these instructions to obtain one.

2. Enter the required fields for every healthcare provider who needs access to the portal. Only 100 users can be uploaded at a time. If your list contains more than 100 users, please create a second document using the Bulk HCP Upload Template.

3. Once you have entered all the information in the Bulk HCP Upload Template, save the file as a .csv file.

4. Submit one file at a time by dragging and dropping the .csv file into the box below. A popup will appear to tell you if your upload was successful and

a. If upload fails: You will get an immediate notification if there are any errors uploading your file.

b. If any records fail: Your file may have uploaded partially. In this case, you will receive a list by email with a column labeled "Error" which identifies the "Error" column and repeat Step 3 to upload the remaining records.

5. Your successfully uploaded records will display on this page below Search by Contact's Name or NCID.

Xa,

Drag and Drop CSV file here

+ Copy

Search by Contact's Name or NCID

Bulk Upload Example


FileHomeShareView

« CO... » Bulk U...

Search Bulk Upload E...

Name	Status	Date modified
Provider Bulk Upload Exam...	✓	8/5/2021 2:33 PM

1 item1 item selected20.0 KBAvailable on this device

 NC DEPARTMENT OF
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Step 6 of 7: Review the Records

CVMS will automatically extract the data from the file and display it for you.

1. Review the records for accuracy
2. Click **CREATE RECORDS**

[Home](#) [Recipient](#) [Appointments](#) [Locations](#) [Bulk Registration](#) [Vaccine Inventory](#) [Vaccine Marketplace](#) [Shipments](#) [More](#) ▼

Instructions for Healthcare Provider Bulk Upload

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b. If you have users that do not have an NCID, have them follow [these instructions](#) to obtain one.

2. Enter the required fields for every healthcare provider who needs access to the portal. Only 100 users can be uploaded at a time. If your list contains more than 100 users, please create a second document using the Bulk HCP Upload Template.

3. Once you have entered all the information in the Bulk HCP Upload Template, save the file as a .csv file.

4. Submit one file at a time by dragging and dropping the .csv file into the box below. A popup will appear to tell you if your upload was successful and if any records failed to upload.

a. If upload fails: You will get an immediate notification if there are any errors uploading your file.

b. If any records fail: Your file may have uploaded partially. In this case, you will receive a list by email with a column labeled "Error" which identifies the issue with each failed record. Once you have resolved all the indicated errors, delete the "Error" column and repeat Step 3 to upload the remaining records.

5. Your successfully uploaded records will display on this page below *Search by Contact's Name or NCID*.

• hcp_bulk_uploadtemplate.csv (application/vnd.ms-excel) - 335bytes, last modified: 8/5/2021

FIRST NAME	LAST NAME	NCID USERNAME	EMAIL ADDRESS	PROFILE
Mike	Tyson	mtyson	miketyson@mailinator.com	Healthcare Provider
Steve	Tyler	styler	stevetyler@mailinator.com	Healthcare Location Mgr
Gene	Simmons	gsimmons	genesimmons@mailinator.com	Healthcare Provider
Deff	Leppard	Deff	DeffLeppard@mailinator.com	Healthcare Location Mgr

[Create Records](#) [Cancel](#)

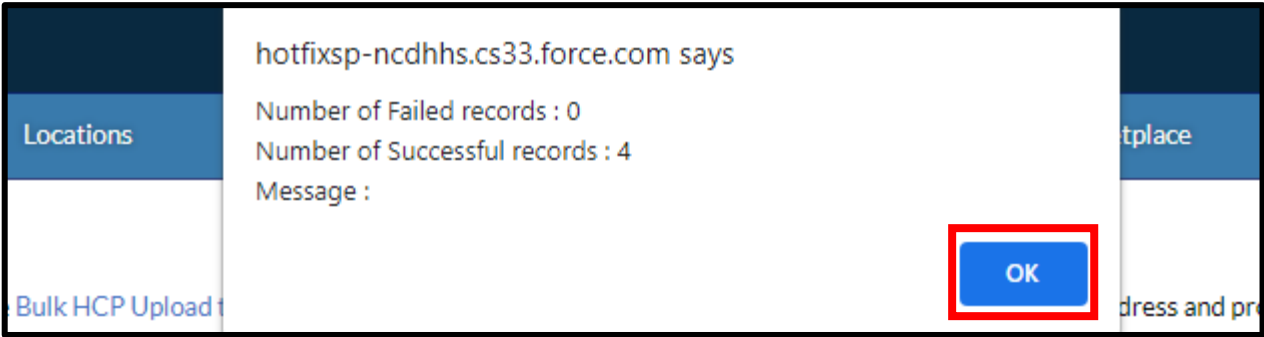
Audience

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Location Manager

Step 7 of 7: Acknowledge Completion of the HCP User Bulk Upload

Once the records have been created in CVMS, a message will appear at the top of the page letting you know how many failed and successful records were uploaded. If a record fails, a message will display with the reason.

- 1. Complete the process by clicking **OK**



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Tips

To prevent errors, ensure that you have entered a valid NCID and Profile type as well as a properly formatted e-mail address.


Notification of Failed Records

If there are any failed records, you will receive an e-mail from CVMS containing a .CSV attachment. The attachment will only show the records that failed to get successfully created along with a new column listing the reason for the upload failure. Successfully uploaded records will be not be shown in the file.


Audience


Healthcare
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[External] Sandbox: Bulk Upload Failure Records



NC CVMS <nccvms@dhhs.nc.gov>

To  Lee, Darrell E.



BulkError.csv

788 bytes

This message is from an EXTERNAL SENDER - be CAUTIOUS, particularly with links and attachments.

Bulk Upload has failed due to some reasons. Please find attachment for Errors.

	A	B	C	D	E	F	G	H	I	J
1	FirstName	LastName	NCID__c	Email	Profile__c	Error				
2	Mike	Tyson	mtyson	miketysor	Location	Line 1 : Please enter a valid CVMS Profile				
3	Steve	Tyler	styler	stevetyler	Healthca	Line 2 : Please enter a valid CVMS Profile				
4	Gene	Simmons	gsimmons	genesimn	Provider	Line 3 : Please enter a valid CVMS Profile				
5	Deff	Leppard	Deff	DeffLeppa	Healthca	Line 4 : Please enter a valid CVMS Profile				
6										
7										

Correcting Failed Records for Re-upload

1. Correct the deficiency
2. Delete the **ERROR:** column
3. Save the file
4. Repeat the upload process

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Healthcare
Location Manager

	A	B	C	D	E	F	G	H	I	J
1	FirstName	LastName	NCID__c	Email	Profile__c	Error				
2	Mike	Tyson	mtyson	miketysor	Location M	Line				VMS Profile
3	Steve	Tyler	styler	stevetyler	Healthcar	Line				VMS Profile
4	Gene	Simmons	gsimmons	genesimn	Provider	Line				VMS Profile
5	Deff	Leppard	Deff	DeffLeppa	Healthcar	Line				VMS Profile
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
18										

Other Operations Available

Add Multiple Locations to a User

Step 1 of 3: Adding Multiple Locations to an Account

You will be able to provide access to additional locations to CVMS Provider Portal accounts you create.

- 1. From the HCP Portal Contact record, click **RELATED**
- 2. Under Related Accounts, click **ADD RELATIONSHIP**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine Inventory

Contact

Lisa Hall

Title

Location Manager

Account Name

Crimson Skies

Phone (2)

Email

lisahall@mailinator.com

DETAILS

RELATED

Related Accounts (1)

Add Relationship

Account Name	Direct	Parent Account
Crimson Skies	<input checked="" type="checkbox"/>	<div></div>

View All

Audience

Healthcare
Location Manager

Tips

Remember, you will only be able to add locations you have access to in the CVMS Provider Portal.

Step 2 of 3: Add Account Relationship

You will see the New Account Contact Relationship page appear.

- 1. Search for the Account (Location) in the search bar
- 2. Select the correct **ACCOUNT NAME** from the drop down
- 3. Click **SAVE**

mentsBulk RegistrationReportsVaccine InventoryMore

New Account Contact Relationship

Please verify the correct Contact is selected. If not, please close this window.

Account Contact Relationship Information

* Account

Search Accounts...

* Contact

Lisa Hall

Relationship Status

Active

Cancel

Save & New


Save

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Tips

Enter at least three characters to see your search results.



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Step 3 of 3: View and Remove Account Relationships

After clicking Save, the new account relationship will be reflected under the Related Accounts. You can always remove access to a location by clicking the **DROP-DOWN ARROW** for the account you wish to remove and selecting **REMOVE RELATIONSHIP**.

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Contact
Lisa Hall

Title

Location Manager

Account Name

Crimson Skies

Phone (2)

▼

Email

lisahall@mailinator.com

DETAILS

RELATED

Related Accounts (2)

Add Relationship

Account Name	Direct	Parent Account
Crimson Skies	<input checked="" type="checkbox"/>	
Crimson Skies - Location 2	<input type="checkbox"/>	Crimson Skies

View All

View Relationship

Edit Relationship

Remove Relationship

Remove a User's CVMS Provider Portal Access

Step 1 of 2: Manage Relationships to View and Alter Access

This step should be completed if you need to remove an individual’s access to the CVMS Provider Portal. CVMS allows you to add and remove access to specific locations as needed. Users will still exist in the system and location access can still be granted as needed in the future. *Note:* This function is only available for active user accounts. For assistance removing access for users with inactive accounts, contact the NC Vaccines Help Desk.

- 1. From the Account Management tab, search for the account using the **NAME OR NCID**
- 2. Click the **DROP-DOWN MENU** for the correct row
- 3. Click **MANAGE RELATIONSHIPS**

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Add Member

Search by Contact's Name or NCID

Search by Contact's Name

Or

Search by Contact's NCID

Search

Reset

Name	Email	Title	NCID	Direct Account Name	Profile	Active	
Steve DiGangi	steven.j.digangi_acn@dhhs.nc...		sdigangi_hcp_lm	TestLoc_UAT1	Healthcare Location Mgr	Yes	Manage Relationships
Steve DiGangi	steven.j.digangi@accenture.c...		sdigangi_training	TestLoc_UAT1	Healthcare Provider - Read O...	Yes	
Darrell Lee	darrell.e.lee@accenture.com		dlee20	TestLoc_UAT1	Healthcare Location Mgr	Yes	

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Location Manager

Tips

Before adjusting a CVMS Provider Portal account, use the NCID username as a unique identifier to confirm you found the correct account.

You will only be able to manage CVMS Provider Portal relationships for accounts to which you are assigned.

Step 2 of 2: Remove Access as Needed

- 1. Select the check box next to the appropriate location(s)
- 2. Click the **REMOVE**

Select the locations to remove:

<input type="checkbox"/>	Locati... ▾	Street ▾	City ▾	State ▾	Country ▾	Postal ... ▾
<input type="checkbox"/>	TestLoc_UAT1	333 aut	townsville	North Carolina	USA	00220
<input type="checkbox"/>	Training Team Vac-cine Provider - Site 1	1332 Turner Woods Drive				
<input type="checkbox"/>	Training Team Vac-cine Provider - Site 2	1332 Turner Woods Drive				

Remove

Close

Audience

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Location Manager

Tips

Please note that if a user was assigned other locations not under your supervision, they will still be able to connect and operate for these other locations after you remove their access to the location you supervise.

Access the HCP Healthcare Roles Report

Accessing the HCP Healthcare Roles Report

1. Navigate to the **MORE** tab and select **REPORTS**
2. On the left, select **ALL REPORTS**
3. Click on the **HCP HEALTHCARE ROLES** Report

Audience

Healthcare
Location Manager

Tips

For more information, see the **ACCESSING REPORTS** section of the **NAVIGATE THE CVMS PROVIDER PORTAL USER GUIDE** at <https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers#step-6---navigate-the-cvms-provider-portal>.

The screenshot displays the CVMS Provider Portal interface. At the top, a navigation bar includes tabs for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, and More. The 'More' tab is selected, and a dropdown menu is open, showing options like Organization Management, Help & Information, Reports (highlighted with a red box), Account Management, and Files. On the left sidebar, under the 'Reports' section, 'All Reports' is selected and highlighted with a red box. The main content area shows a list of reports. The 'HCP Healthcare Roles' report is highlighted with a red box. It is located under the 'FOLDERS' section, specifically under 'All Folders'. The report description states: 'This report identifies all users and associated roles at the location of the logged in user.'

REPORTS	Report Name	Description	Folder	Created By	Created On
Recent	Availability Report	Availability Report per Skedulo location	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM
Created by Me	Dose 1 Vaccine Supply Report	Vaccine supply Current Stock for Dose 1	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM
Private Reports	Dose 2 Vaccine Supply Report	Vaccine supply Current Stock for Dose 2	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM
FOLDERS	HCLM EHR Error Report - Cases		2489 Reports	George Jaramillo	2/14/2021, 8:53 PM
All Folders	HCP Healthcare Roles	This report identifies all users and associated roles at the location of the logged in user.	Provider Reports	George Jaramillo	1/31/2021, 8:30 PM

Accessing the HCP Healthcare Roles Report (Continued)

The HCP Healthcare Roles Report provides the list of every account associated with the account to which you are logged in.

Audience

Healthcare
Location Manager

Tips

To view accounts assigned to other locations, you will need to switch locations from the home screen.

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

Report: Users RT Custom

HCP Healthcare Roles

This report identifies all users and associated roles at the location of the logged in user.

Total Records

6

<input type="checkbox"/> Account: Account Name ↑	First Name	Last Name	Contact: Title	Contact: NCID	Email	Last Login
<input type="checkbox"/> TestLoc_UAT1 (6)	Steve	DiGangi	-	sdigangi_hcp_lm	steven.j.digangi_acn@dhhs.nc.gov	7/23/2021, 2:06 PM
	Steve	DiGangi	-	sdigangi_training	steven.j.digangi@accenture.com	7/23/2021, 1:22 PM
	Darrell	Lee	-	dlee20	darrell.e.lee@accenture.com	7/29/2021, 4:52 PM
	Darrell	Lee	-	darrell.e.lee	darrell.lee-acn@dhhs.nc.gov	5/18/2021, 3:37 PM
	Steve	DiGangi	-	sdigangi_statewidelm	steven.j.digangi@accenture.com	7/9/2021, 10:08 AM
	UAT	Tester	-	uat12	avion.bell@ey.com	-
Total (6)						

Appendix

How to Edit a User's Email Address on the HCP Portal Contact Record

When a User Contact record is created, an automatic email is sent to the email address provided confirming their new CVMS Provider Portal account. It is very important that you enter the correct email address.

If you need to correct the email address after the record is created, the new email address **WILL NOT** receive an automatic email notification.

You will need to **MANUALLY PROVIDE** the individual with the **CVMS PROVIDER PORTAL LINK** and **LOG IN INSTRUCTIONS** to confirm their new account.

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

ContactLisa Hall

TitleLocation Manager

Account NameCrimson Skies

Phone (2) ▼

Emaillisahall@mailinator.com

DETAILS

RELATED

NameLisa Hall

Account NameCrimson Skies

TitleLocation Manager

Phone

Mobile






Emaillisahall@mailinator.com

NCIDlisahall4

ProfileHealthcare Location Mgr

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more details on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (non-Chromium) browsers are not supported.

User Guide Change Log

Version	Date of Change	Changes Made	Author
1	2/14/2021	<ul style="list-style-type: none"> Initial version 	Azalea Troche, Darrell Lee, Kechia Scott
2	2/17/2021	<ul style="list-style-type: none"> Renamed User Guide to reflect User Account Management Removed slides related to Organization Management to a separate user guide 	Kechia Scott
3	3/10/2021	<ul style="list-style-type: none"> Updated Screenshots 	Nicholas M. Rinz
4	3/12/2021	<ul style="list-style-type: none"> Update Recipient Check-in Updated Scheduling tab back to locations tab 	Kechia Scott
5	5/5/2021	<ul style="list-style-type: none"> Added tip about updated e-mail addressed automatically receiving HCP invitation e-mail 	Darrell Lee
6	5/14/2021	<ul style="list-style-type: none"> Note added about Profile types 	Darrell Lee
7	5/25/2021	<ul style="list-style-type: none"> Updated to instruct location managers to only deactivate users that they are sure are no longer active 	Darrell Lee
8	6/15/2021	<ul style="list-style-type: none"> Remove ability to deactivate a user and replace with Managing Relationships Added Step 2 of Managing Relationships Updated screenshots to reflect Vaccine Marketplace 	Darrell Lee
9	7/28/2021	<ul style="list-style-type: none"> New consolidated version 3: New table of contents 7: Added list of features available per profile 25-27: New reports slides 	Vanessa Kemajou Darrell Lee
10	8/5/2021	<ul style="list-style-type: none"> 17-28: Added Add Existing User to Your Location and Bulk Upload New User Accounts sections 11: Added note to skip ahead to new section if a user already exists within CVMS 	Darrell Lee
11	8/24/20201	<ul style="list-style-type: none"> 10: Added note about creating the initial Healthcare Location Manager as part of the PE process 14: Updated tip about active vs. inactive accounts 35: Added note about contacting the help desk for inactive user accounts 	Darrell Lee
12	9/15/2021	<ul style="list-style-type: none"> Help desk hours updated 	Kaitlin Gates